Alpine Atlantic Asset Management AG

SERVICE. TRUST. PERFORMANCE.

Your Gateway to
Global Wealth Management,
Diversification and Asset Protection.

At Alpine Atlantic, our mission is to provide our clients with the most protected, personalized, and professional global wealth management service available. Our expertise lies in building highly efficient investment portfolios with a clear focus on international diversification amongst global financial markets and instruments. In constructing client portfolios we integrate traditional instruments (stocks, bonds, money markets) as well as non-traditional or so-called alternative investments (hedge funds, private equity, insurance-linked securities, commodities, real estate). Our team of investment professionals makes use of the most suitable investment instruments for each client. There has been tremendous growth in the global investment universe over the last decade. This requires global investment expertise, such as that of Alpine Atlantic, in order to maximize protection and growth of family (client) assets. We work together with a global network of banks and other experts such as legal counsel, tax experts, trust companies and family offices. Our partners help us screen global financial markets as we are in constant search for the most promising and stable investments. Despite any market conditions there are always attractive investments available. It is our mandate to ensure that client wealth finds its way to these opportunities.

Our independence

What makes us special is not only the way we engineer investment portfolios, but also that we act as a fully independent provider of these services. We do not sell our own financial products, but have the flexibility to compare and evaluate what's available, therefore making sure that the client has the best solution. Our independence and open company structure also enables us to work with some of the most well-respected experts in other areas which help us provide "turn-key" solutions for global wealth management and asset protection.

Our experience

Having worked for some of the best firms in the investment and banking industries and with well-known corporations, our team of financial experts has considerable experience in managing investment portfolios. With this experience, we focus on generating highly optimized, long-term returns for our clients. However, delivering outstanding investment performance is not the only added value for our customers, linking them to a global network of experts helps the clients maximize and protect their wealth.

Interview with Daniel Zurbrügg, CFA, Managing Partner

Q: ***After having managed investment portfolios for some of the biggest corporations (Compagnie Financière Richemont, Philip Morris) as treasury manager and for high net worth clients and families as a banker, what was your appeal to work as an independent asset manager?***

A: Coming from the corporate side of the business originally, my focus has always been on delivering superior, risk-adjusted returns. Also by having worked for private clients and families, I value the human currency of the business and building fruitful, long-term relationships with our clients. In our view, today's asset management business is too centred on product selling, especially the banks. Our approach is different in that we see ourselves as an independent partner and solution provider for our clients.

Q: ***You mentioned that you see yourself as a provider of "turn-key" asset management solutions. What exactly do you mean by this?***

A: Our job is to deliver superior long-term performance for our clients; however, we do not only measure performance as a return on capital. We can improve benefits for our clients by managing their wealth and even more importantly, protecting their assets. In order to build the most sophisticated investment portfolios, clients need to have access to all of the opportunities global investing has to offer. This can only be done by working with a sophisticated network of experts such as the one we have from many different specialties.

Q: ***What's your investment philosophy? How to you achieve superior, risk adjusted returns?***

A: We are a global asset management company. This means that we invest worldwide in stocks, bonds, hedge funds, private equity, real estate and commodities. The investment universe has changed so dramatically over the last decade that a traditional investment approach simply does not result in an efficient portfolio. Asset managers have to adjust to globalization and make use of whatever opportunities arise. Also, it would not be realistic to cover all relevant global markets on our own. Due to the fact that we have an "open company structure", however, we can work with a network of global contacts, each one an expert in its chosen field of activity, be it emerging market equities, Japanese real estate, or Canadian hedge funds to name a few. This highlights the importance of a strong network, which allows us to source additional expertise to maximize global diversification and returns for our clients who we also consider as our partners.

Q: ***There seems to be a tendency in the wealth management industry towards working with asset managers that offer a more personalized service? Could you confirm this impression?***

A: Yes, absolutely. We value the human currency of the business. Building successful long-term business relationships is one of the most critical factors in our business. What makes us unique is the fact that we work with our clients and have no conflict of interest because we aren't obliged to sell our own products. Also, by working together with some of the finest banking partners, there is always a clear separation between asset management and custody of the assets. Therefore, we do not have any interest in creating more activity in a portfolio than necessary. In fact, by working with us, clients benefit from lower fees charged by banks and other partners. We focus on protecting client wealth and providing superior long-term performance and highly personalized client service.

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